

MEETING SUMMARY
PROPERTY TAX ADMINISTRATION TASK FORCE
JANUARY 10, 2001 – 9:00 AM TO 3:00 PM

MOBILE HOME BREAK-OUT SESSION – 9:00 AM to 9:50 AM

The mobile home break out session was cancelled for lack of quorum of the members.

FULL MEMBER SESSION – 10:00 AM to 1:30 PM

MEMBERS PRESENTS: Rod Adams, Jimmy Alvarez, Keith Baker, Robert Banking, Bill Coleman, Morgan Gilreath, Bill Graham, Bill Herrle, Fred Meeker, Sharon Outland, Vicki Potts, (new, representing the telecommunications industry), Matt Ryan (new, representing the Florida Home Builders Association), Ken Small, Bill Suber, Jim Zingale (Chair).

MEMBERS ABSENT: Rene Lewis, Terry Lewis, Alita Marlo, Randy Miller, Mindy Toback-Seiden, Vicki Weber. Karl Zimmerman resigned from the Task Force and was replaced by Vicki Potts.

Jim Zingle, Chair, opened the morning session at 10:00 am, and announced that the mobile home breakout session was cancelled for failure of the group to make a quorum. Issues identified as relevant to the Task Force by the mobile home group will be discussed at a subsequent meeting. The TPP and Assessment Appeals breakout sessions are scheduled to meet at 1:00 PM.

The Chair provided an overview of how the Department envisioned the organization of the April 2000 meeting, specifically, the Department's development of legislative concept in June. Jim Zingale asked the members to start giving consideration about how the group wants to pull things together so that the Department can assist the Task Force in identify concepts for the 2002 Legislative Session.

Commissioner Bob Rackleff, was introduced as the new representative of the Florida Association of Counties, and Vicki Potts, Charlotte County Tax Collector, was introduced as the new representative for the Florida Tax Collectors.

Jimmy Alvarez requested that the October 12, 2000, meeting summary be changed to reflect that it was his intent to point out that the DOR is moving back toward fee appraisal, as opposed to the minutes incorrectly reflecting that Mr. Alvarez stated that the Auditor General was requiring that the new methodology be implemented by the Department. The minutes stand corrected as requested by Mr. Alvarez.

Next, David Beggs, Department analyst, provided an overview and update of the PTA Action Plan which was designed to respond the Auditor General's 2000 Report. Mr. Beggs stated that steps outlined in the plan were being implemented on a timely basis. Jim Zingale asked members and the audience to provide any suggestions, which could assist in making the action plan updates easier for the public to understand.

The next presentation made to the membership was by Steve Keller. Mr. Keller provided a briefing to the members on where in the development process the real property and market area guidelines are. He stated that both sets of guidelines are following roughly the same track. At the first workshop held in November 2000, the Department did not receive any comments. As a result of the January 2001 workshops for both guidelines, some written comments were received. He announced that the department is implementing a feature on its Internet Web site which will allow the public to provide e-mail comments on the guidelines.

Chairman Zingale provided the following URL for the real property guidelines:

<http://sun6.dms.state.fl.us/dor/property/RP/pcomment.html>

Mr. Keller explained that the Department expects to prepare an additional public comments concepts list through January 19, 2001, and will post the comments list on the Web site as soon as it is prepared. He pointed the members to a document previously provided identifying the timeline for development. He explained that the next public workshop on the guidelines was being planned in late February or early March, 2001. The Chairman requested that all members of the Task Force solicit as much input as they can from individual membership of their respective organization.

A short discussion among the group concerned the issue of whether the Department could easily post tax roll certification dates on its Internet Website, as it had been requested to do at a February 2000 conference on state and local taxation sponsored by the Florida Institute of Certified Public Accountants and the Florida Bar. Vicki Weber brought the issue forward to the Task Force as an item that merited discussion at one of the earlier meetings. Steve Keller provided an explanation of the work which the Department did in an effort to compile the 2000 tax roll certification dates and how the Department confirmed dates in an effort to provide a single page on the Department's Internet site which all 67 tax roll certification dates for calendar year 2000. He explained that the Department received an objection to going forward with this plan and had delayed further implementation until such time as the Task Force could be advised of the pro's and con's of a centrally located posting. Mr. Alvarez, Ms. Outland, and Mr. Coleman provided comment on what they thought about the idea.

Mr. Zingale stated that the Department would not be going forward with a certification date listing on its Website this year as the window of usefulness of the information has almost expired. He stated that it was the Department's opinion that there is value to the public in posting correct dates in one central location. He requested that this issue be placed on the agenda for a future meeting so that the Department can implement such a posting in the 2001 appeals season, if that is the general consensus of the membership.

Hugh Harrell, Process Manager for Field Services gave a presentation on sample voiding/sample replacement policy. A brief discussion followed among several of the members as to the ramifications the Department's new study procedures outlined in the PTA Action Plan would have on the tax rolls. Chairman Zingale explained that the plan had concurrence from the Auditor General, year two of the plan required more resources, and that this first year of the plan has required many of the Department's staff appraisers to work

substantial overtime. He explained that the Department has requested the Governor and Legislature provide the Program with funding to hire 50 more appraisal employees in July 2001. Mr. Zingale explained that the new positions would be required to successfully complete the plan in the next two years. Mr. Alvarez asked the chair if it would be reasonably to expect a commiserate increase in the staffing of the property appraisers' offices, in light of the increased complexity planned for the in-depth study. Mr. Zingale responded that he will be talking to the Legislature about the need for additional resources in the property appraiser's offices.

Lisa Echeverri, the Department's Legislative and Cabinet Affairs director provided the members was a update on what has happened with the Department's seven legislative concepts for property tax.. The Governor and Cabinet have said that the Department can move forward with the concepts and begin working with the legislative staff to include the concepts in the Department's legislative package.

FULL MEMBERSHIP RESEARCH ITEMS

The remainder of the morning was spent discussing several research reports, which were compiled by the Department at the request of members. Details of these discussions are not outlined in this summary because they entailed a series of questions and comments members had as to how to interpret data in the research documents. Documents provided to members for this meeting can be reviewed by referencing the 11:00 AM Green Packet provided to members on this date.

[LUNCH BREAK]

ASSESSMENT APPEALS FOCUS GROUP SESSION – 1:30 PM to 2:30 PM

The group facilitator explained that the afternoon's goal was to continue to identify and clarify the specific problems with the assessment appeals process in Florida; identify root causes for the problems; look at desired outcomes; and identify and additional research and data needed from staff for the group to make recommendations to the full membership.

Time ran out before the Assessment Appeals Focus Group was able to reach consensus as to the priority of the areas of concern identified in previous meetings.

TANGIBLE PERSONAL PROPERTY FOCUS GROUP SESSION – 1:30 PM to 2:30 PM

The Facilitator explained that the afternoon's goal for this group was to continue efforts to identify and clarify the specific problems with the tangible personal property assessment process in Florida; identify root causes for the problems; look at desired outcomes; and identify the research and data needed from staff for the group to make recommendations to the full membership.

RECONVENE FULL MEMBER SESSION – 2:30 PM TO 2:50 PM

The Chair announced that the next meeting, will be on April 11, 2001, and the general format and agenda for the meeting will be the same as January 10, 2001, agenda with only minor changes when and where needed.

Summary Compiled By:

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